

Annexure- B

Complaint Data to be displayed by Portfolio Managers

Date : 03-04-2024

Format for investor complaints data to be disclosed by Portfolio Managers on their website on monthly basis:

Data till the month ending –Dec 2023 (From Jan 2022)

Sr. No.	Received from	Pending at the end of last month	Received	Resolved*	Total Pending#	Pending complaints > 3months	Average Resolution time^ (in days)
1	Directly from Investors	NIL	NIL	NIL	NIL	NIL	NIL
2	SEBI (SCORES)	NIL	NIL	NIL	NIL	NIL	NIL
3	Other Sources (if any)	NIL	NIL	NIL	NIL	NIL	NIL
	Grand Total	NIL	NIL	NIL	NIL	NIL	NIL

^ Average Resolution time is the sum total of time taken to resolve each complaint in days, in the current month divided by total number of complaints resolved in the current month.

Trend of monthly disposal of complaints

Sr. No.	Month	Carried forward from previous month	Received	Resolved*	Pending#
1	Jan 2022	Nil	Nil	Nil	Nil
2	Feb 2022	Nil	Nil	Nil	Nil
3	Mar 2022	Nil	Nil	Nil	Nil
4	Apr 2022	Nil	Nil	Nil	Nil
5	May 2022	Nil	Nil	Nil	Nil
6	June 2022	Nil	Nil	Nil	Nil
7	July 2022	Nil	Nil	Nil	Nil
8	Aug 2022	Nil	Nil	Nil	Nil
9	Sept 2022	Nil	Nil	Nil	Nil
10	Oct 2022	Nil	Nil	Nil	Nil
11	Nov 2022	Nil	Nil	Nil	Nil

12	Dec 2023	Nil	Nil	Nil	Nil
13	Jan 2023	Nil	Nil	Nil	Nil
14	Feb 2023	Nil	Nil	Nil	Nil
15	Mar 2023	Nil	Nil	Nil	Nil
16	Apr 2023	Nil	Nil	Nil	Nil
17	May 2023	Nil	Nil	Nil	Nil
18	June 2023	Nil	Nil	Nil	Nil
19	July 2023	Nil	Nil	Nil	Nil
20	Aug 2023	Nil	Nil	Nil	Nil
21	Sep 2023	Nil	Nil	Nil	Nil
22	Oct 2023	Nil	Nil	Nil	Nil
23	Nov 2023	Nil	Nil	Nil	Nil
24	Dec 2023	Nil	Nil	Nil	Nil
25	Jan 2024	Nil	Nil	Nil	Nil
26	Feb 2024	Nil	Nil	Nil	Nil
27	Mar 2024	Nil	Nil	Nil	Nil
	Grand Total	Nil	Nil	Nil	Nil

*Inclusive of complaints of previous months resolved in the current month.

#Inclusive of complaints pending as on the last day of the month.

Trend of annual disposal of complaints

SN	Year	Carried forward from previous year	Received	Resolved**	Pending##
1	2018-19	Nil			
2	2019-20	Nil			
3	2020-21	Nil			
4	2021-22	Nil			
5	2022-23	Nil			
6	2023-24	Nil			
7	2024-25 YTD	Nil			
	Grand Total	Nil			

** Inclusive of complaints of previous years resolved in the current year. ##

Inclusive of complaints pending as on the last day of the year.